FIG. 1

PC1

PC2

PC3

...

PORTABLE PC1

PORTABLE PC2

...

10

INTERNET, VPN, LEASED LINES, ETC.

EXTERNAL APPLICATION SERVER(S) — 50

EXTERNAL MARKETING DATA — 60

CUSTOMER CHANNELS — 70

CALL CENTER

LIT./EMAIL DISTR.

MEDIA

40

WEBSERVER

PROG RAM

42 — NON-VOL. MEM.

PORTAL PROG.

WAN/LAN

30

FILE SERVER

PROC. RAM

NON-VOL MEM.

CUSTOMER INFO FILES — 31

TRANSACTION FILES — 32

CAMPAIGN FILES — 33

...

20

APPLICATION SERVER

PROC. RAM

CAMPAIGN MGT. APP.

NON-VOL. MEM

WORKFLOW APP. — 24

— 25

...

ANALYSIS & REPORTING APP. — 21

ANALYTICAL MODELING APP. — 22

CAMPAIGN OPTIMIZATION APP. — 23

FIG. 2

Marketing

Marketing Management

Phase 1 Analyze	Phase 2 Plan and Develop	Phase 3 Optimize/Refine	Phase 4 Fulfill/Execute	Phase 5 Measure
2-4 Days	2-4 Days	1-2 Days	n Days	1-2 Days

Collect Data/Test Ideas — 102

Refine & Analyze Data — 114

Define Segments/Programs — 116

Plan Campaigns — 122

Generate/Refine Lists — 124

Run Campaigns — 134

Review Results — 142

Agency

Conduct Surveys/Research — 104

Provide Research Data — 106

Create Content/Offers — 118

Test Offers/Campaigns — 126

Conduct Surveys/Research — 144

Database Marketing

Provide Statistical Models — 112

Model Lists/Segments — 132

Info Services

Source & Cleanse Data — 108

Support Data/Tool Requests — 110

Support Data/Tool Requests — 120

Support Data/Tool Requests — 130

Create Ad-Hoc Reports — 146

Operations

Operate Tele-marketing — 128

Operate Web Site — 136

Operate Service Center — 139

Provide Operations Reports — 140

Data Sources

Customer Interaction Channel

70

PORTAL LAYER

46
WORKBENCH COMPONENT

44
ROLE PORTAL COMPONENT

42

WORKFLOW PROCESS ENABLEMENT

25

21
Analysis and Reporting

22
Analytic Modeling

23
Campaign Optimization

24
Campaign Mgt.

DATA INTEGRATION LAYER (CAR)

80

31
Customer Info

32
Transactions

33
Campaigns

60

10

FIG. 3

FIG. 4

42

PORTAL LAYER

44

ROLE PORTAL
COMPONENT

- EXECUTIVE

- MARKETING
  MANAGER

- DATA
  ANALYST

  ○
  ○
  ○

46

WORKBENCH
COMPONENT

- HOMEPAGE
  - SCORECARDS
  - TASKS (TO DO's)
  - ALERTS
  - COMPANY NEWS
  - OTHER NEWS
  - WEBSITE LINKS
- ACTIVITIES PAGE
  - TASKS (TO DO's)
  - RESOURCES AND
    REFERENCES
- MARKETING CAMPAIGNS
  PAGE
  - S/W APP. ACCESS
  - CAMPAIGN INFO
    AND METRICS
- CUSTOMER ANALYSIS
  PAGE
  - S/W APP. ACCESS
  - ANALYTICS
  ○
  ○
  ○

File Edit View Favorites Tools Help

Address

accenture   *Insight Driven Marketing*

Marketing Executive

Welcome, administrator ! Alerts! – My Account – Admin – Reports – Delivers – Help – Log Off

Home | Activities | Competitors | Customer Analyst

Company Scorecard   [Edit]

Company Measures	Value	Target	Status
Customer Base in thousands	5,051	5,000	
Total Company Revenue $M	12,535	10,650	
Total Net Income $M	1,803	1,798	

Company Percentages
■ Actual   ■ Target

100
80
60
40
20
0

Brand Recognition   Market Share
Customer Satisfaction   Share of Wallet

New Section | Add Folder | Edit Column

Customer Scorecard   [Edit]

Retention Measures	Value	Target	Status
Accounts Closed	43,068	45,000	
Asset Retention %	93	90	
Customer Retention Rate %	91	90	
Customer Satisfaction %	87	80	

Modify Request – Printer Friendly – Refresh

Acquisition Measures	Value	Target	Status
Avg. Acquisition Cost $	279	280	
Customers Acquired	53,525	50,000	
New Avg. Profitability $	979	750	

Development Measures	Value	Target	Status
# Accts per Cust.	2	2	
Customer Active Accounts	598,962	500,000	
Customers	776,269	750,000	
Revenue per Cust.$	788	600	
Total Cost per Cust. $	234	250	
Total Net Income per Cust. $	554	350	

New Section | Add Folder | Edit Column

Company News   [Edit]

MEGAB

12.35
12.3M
11.1%
11.3%
11.3%
11.2%

Quarter Two Earnings Statement

NEWS
CNN
Advertising Age
Weather
CBS MarketWatch
Business Week

Research
Young Families Research
DINKs Research
Young Families Tenure Matrix

New Section | Add Folder | Edit Column

New Column   New Page   Properties

FIG. 5

210
244
238
240
230
242
244
236
216
214
212
226
224
222
220
232
234
246
200

FIG. 6

accenture *Insight Driven Marketing*

Marketing Manager

Welcome, Administrator · Alerts · My Account · Admin · Reports · Deliver · Help · Log Off

New Column · New Page · Properties

Home | Activities | Campaigns | Customer Analysis

330

336

332

Marketing Activities   Edit

Retention
- Loyalty Program Update ●
- Retain High Value Singles ●
- Retain High Value Families ●
- Retain High Value DINKs ●

234

Development
- Grow Low Trans. Brokerage Accts. ●
- Grow Average Trans. Value ●
- Develop Day Trading Accts. ●

Acquisition
- Cross Sell Family Home Loans ●
- Cross Sell CC Customers ●

My Tasks   Edit

FILTER: Maria Martinez ▼

Insight Driven Marketing Activities
- ⊟ ● Fall 2001 Marketing Strategy
  - ⊞ ● Understand Customers & Markets
  - ⊞ ● Develop Customer Strategy
  - ⊞ ● Retention
  - ⊞ ● Development
  - ⊞ ● Acquisition
  - ⊞ ● Drive Loyal Behavior Among New

352

354

350

Customer Scorecard   Edit

Modify Request – Printer-friendly – Refresh

Retention Measures	Value	Target	Status
Accounts Closed	43,068	45,000	●
Asset Retention %	93	90	●
Customer Retention Rate %	91	90	●
Customer Satisfaction %	87	80	●

Acquisition Measures	Value	Target	Status
Avg. Acquisition Cost $	279	280	●
Customers Acquired	53,525	50,000	●
New Avg. Profitability $	979	750	●

Development Measures	Value	Target	Status
New Customer Retention %	82	80	●
Prospect Conversion %	22	20	●
Sales Cycle Time in days	21	25	●

Development Measures	Value	Target	Status
# Accts per Cust.	2	2	●
Customer Active Accounts	598,962	500,000	●
Customers	776,269	750,000	●
Operating Cost per Customer $	27	20	●
Selling Cost per Customer $	46	40	●
Service Costs per Customer $	160	150	●

New Section | Add Folder | Edit Column

356

Company News   Edit

MEGAB

Quarter Two Earnings Statement

News   Edit
- Advertising Age
- CNN
- The Weather Channel
- Business Week
- The Wall Street Journal

Research
- Young Families Research
- Families with Teens Research
- Young Families Tenure Matrix

New Section | Add Folder | Edit Column

Data Analyst

Home | Activities | Customer Analysis | Campaign Scorecard | Campaign

Welcome, Administrator ! Alerts! - My Account - Admin - Reports - Delivery - Help - Log Off

New Column New Page Properties

438   *430*   *440*   *442*   *432*   *450*   *460*

Marketing Activities [Edit]

Retention
- Loyalty Program Update
- Retain High Value Singles
- Retain High Value Families
- Retain High Value DINKs

Development
- Grow Low Trans. Brokerage Accts.
- Grow Average Trans. Value
- Develop Day Trading Accts.

My Tasks [Edit]

FILTER: [Dan Duali ▼]

Insight Driven Marketing Activities
- ⊟ ● Fall 2001 Marketing Strategy
  - ⊞ ● Understand Customers & Ma
  - ⊞ ● Develop Customer Strategy
  - ⊞ ● Retention
  - ⊞ ● Development
  - ⊞ ● Acquisition
  - ⊞ ● Drive Loyal Behavior Among
  - ⊞ ● Win-back Initiative to Rece
  - ⊞ ● Defection Prevention Progr

Campaign Scorecard [Edit]

Program Type	Campaign Description	Contact Count	Response Count	Response Rate	Conversion Rate %
Acquisition	Acquire Young Professionals	1,994,333	39,708	2.0%	34.9%
	Cross Sell Credit Card Consumers	2,477,560	123,804	5.0%	40.1%
	Cross Sell Family Home Loans	13,855	570	4.1%	31.8%
Development	Develop Day Trading Accounts	20,823	800	3.8%	46.0%
	Grow Low Transaction Brokerage Accounts	917,858	45,787	5.0%	50.4%
	Loyalty Program Update	3,250,078	96,719	3.0%	39.8%
Retention	Retain High Value DINKYs	964,090	29,038	3.0%	30.4%
	Retain High Value Families	1,243,44?	74,283	6.0%	44.9%
	Retain High Value Young Singles	1,712,270	34,063	2.0%	24.7%
	Retain Young Families	60,000	6,000	10.0%	10.0%

New Section | Add Folder | Edit Column

Company News [Edit]

MEGAB

Quarter Two Earnings Statement [Edit]

News:
CNN
Weather
Advertising Age

Research: [Edit]
▪ Customer Analytic Record
▪ Brokerage Churn Model

[REFRESH]

New Section | Add Folder | Edit Column

FIG. 7

accenture > *Insight Driven Marketing*

Marketing Executive

Welcome, Administrator ↑ Alerts! - My Account - Admin - Reports - Delivery - Help - Log Off

Home | Activities | Dashboard | Customer Analysis

New Column New Page Propertie

Task Details

FILTER: [Maria Martinez ▼]

Insight Driven Marketing Activities
- ⊟ Fall 2001 Marketing Strategy
  - ⊞ Understand Customers & Markets
  - ⊞ Develop Customer Strategy
    - ⊞ Retention
    - ⊞ Development
    - ⊞ Acquisition
    - ⊞ Drive Loyal Behavior Among Newly Acquired Custo
    - ⊞ Win-back Initiative to Recent Defectors
    - ⊞ Defection Prevention Program
    - Iniate Program
    - Initiate Customer Strategy

Task Details [Edit]

Task Details

Assignee	Maria Martinez --- Marketing Campaign Manager
Phone Number	(612)277-8778
Work Item:	Initiate Program
Status:	Impacted
Date Assigned	20-Jul-01
Date Due:	25-Jul-01
Input Forms:	Input Program Name
Description:	To start a new program strategy process, open the attached form and enter an identifying name for this process. This name will be used to maintain relationships later on in the process (es).

Actions

[Continue] [Reassign]

[Edit]

Online References

R09 CompanyAssessment-KPI report.doc
R20b Objectives Memo.doc
R20 BusinessObjectives-KPIReport.doc

530

560

565

554

FIG.8

Home | Activities

Welcome, Administrator - Admin - My Account - Admin - Reports - Delivers - Help - Log Off

New Column - New Page - Properties

Campaigns | Customer Analysis

Active Campaigns (670)

Program Type	Campaign Description	Est ROI	ROI Target	Status
	Acquire Young Professionals	8.15%	8.00%	●
Acquisition	Cross Sell Credit Card Consumers	8.70%	8.00%	●
	Cross Sell Family Home Loans	13.09%	12.80%	●
	Develop Day Trading Accounts	10.05%	10.00%	●
Development	Grow Average Transaction Value	10.70%	10.20%	●
	Grow Low Transaction Brokerage Accounts	16.20%	15.00%	●
	Loyalty Program Update	9.90%	8.50%	●
Retention	Retain High Value DINKs	10.80%	9.50%	●
	Retain High Value Empty Nesters	12.43%	12.25%	●
	Retain High Value Families	11.90%	11.30%	●
	Retain High Value Young Singles	14.10%	14.00%	●
	Retain Young ...			◀

Campaign Selection Criteria (630)

Promo Type	Promo Description	Channel	Promo Date
(All Choices)	(All Choices)	(All Choices)	[Select]

Campaign History (660) (672)

Program Type	Campaign Description	Contact Count	Response Count	Response Rate %	Purchase Rate %	Conversion Rate %
	Acquire Young Professionals	1,994,333	39,708	2.0%	0.7%	34.9%
Acquisition	Cross Sell Credit Card Consumers	2,477,560	123,804	5.0%	2.0%	40.1%
	Cross Sell Family Home Loans	13,855	570	4.1%	1.3%	31.8%
Development	Develop Day Trading Accounts	20,823	800	3.8%	1.8%	46.0%
	Grow Low Transaction Brokerage Accounts	917,858	45,787	5.0%	2.5%	50.4%
	Loyalty Program Update	3,250,078	96,719	3.0%	1.2%	39.3%
Retention	Retain High Value DINKYs	964,090	29,038	3.0%	0.9%	30.4%
	Retain High Value Families	1,249,443	74,283	6.0%	2.7%	44.9%
	Retain High Value Young Singles	1,712,270	34,063	2.0%	0.5%	24.7%
	Retain Young Families	60,000	6,000	10.0%	1.0%	10.0%

New Section | Add Folder | Edit Column

Modify Request - Printer Friendly - Refresh - Download Data

FIG. 9

Marketing Manage...

Welcome, Administrator ! Alerts ! · Admin · My Account · Admin · Reports · Delivers · Help · Log Off

New Column New Page Properties

Home | Activities | Campaigns | Customer Insight

Campaign Management Application [Edit]
Launch Campaign Management Application

Active Campaigns [Edit]

Program Type	Campaign Description	Est. ROI	ROI Target	Status
Acquisition	Acquire Young Professionals	8.15%	8.00%	●
	Cross Sell Credit Card Consumers	8.70%	8.00%	●
	Cross Sell Family Home Loans	13.09%	12.80%	●
	Develop Day Trading Accounts	10.05%	10.00%	●
Development	Grow Average Value	10.70%	10.20%	●
	Grow Low Transaction Brokerage Accounts	16.20%	15.00%	●
	Loyalty Program Update	9.90%	8.50%	●
	Retain High Value DINKs	10.80%	9.50%	●
	Retain High Value Empty Nesters	12.43%	12.25%	●
Retention	Retain High Value Families	11.90%	11.30%	●
	Retain High			

Campaign Selection Criteria [Edit]

Promo Type	Promo Description	Channel	Promo Date
(All Choices)	(All Choices)	(All Choices)	[Select]

Campaign History [Edit]

Program Type	Campaign Description	Contact Count	Response Count	Response Rate %	Purchase Rate %	Conversion Rate %
	Acquire Young Professionals	1,994,333	39,708	2.0%	0.7%	34.9%
Acquisition	Cross Sell Credit Card Consumers	2,477,560	123,884	5.0%	2.0%	40.1%
	Cross Sell Family Home Loans	13,855	570	4.1%	1.3%	31.8%
	Develop Day Trading Accounts	20,823	800	3.8%	1.8%	46.0%
Development	Grow Low Transaction Brokerage Accounts	917,858	45,787	5.0%	2.5%	50.4%
	Loyalty Program Update	3,250,078	96,719	3.0%	1.2%	39.8%
	Retain High Value DINKYs	964,090	29,038	3.0%	0.9%	30.4%
Retention	Retain High Value Families	1,243,443	74,283	6.0%	2.7%	44.9%
	Retain High Value Young Singles	1,712,270	34,063	2.0%	0.5%	24.7%
	Retain Young Families	60,000	6,000	10.0%	1.0%	10.0%

New Section | Add Folder | Edit Column

730

220 224 222 260 272

FIG. 10

![FIG. 11 — 830]

accenture Insight Driven Marketing

Data Analyst

Home | Activities | Customer Analysis
Campaigns

New Column New Page Properties

Data Mining Applications
Launch Analytical Modeling Tool

Add an Analytical Report
Rename or Delete a link.

Please enter only the name of the folder of the Analytical Report that was created (*Required field)

*Folder Name: _____
Folder Alias: _____
(If you would like to enter a more descriptive text for the link name)

Segment Overview

Customers by Segment

- Dinks
- Empty Nesters
- Families with Teens
- Retired
- Young Families
- Young Singles

24.2% 29.9% 7.8% 15.4% 10.6%

Key Metrics

Lifestage Segment	Total Product Count	Products per Customer	Total Assets	Total Profitability
Dinks	1,725,053	2.30	$8,514,896,366	$371,519,000
Empty Nesters	2,681,563	2.55	$55,220,791,311	$309,959,230
Families with Teens	2,401,192	2.40	$26,206,477,568	$348,602,730
Retired	2,781,498	2.78	$89,686,516,090	$245,735,795
Young Families	1,660,537	2.24	$8,442,830,751	$457,661,740
Young Singles	825,345	1.65	$954,198,771	$74,439,790

Demographics

Lifestage Segment	Average Age	Average Income	Average Family Size	% Married	% Male
Dinks	30.5	$60,012	1.5	40.0%	55.1%
Empty Nesters	55.5	$70,021	1.5	80.1%	45.0%
Families with Teens	46.5	$65,023	3.5	90.0%	51.1%
Retired	79.5	$45,028	1.5	80.1%	45.1%
Young Families	38.5	$50,013	2.5	70.1%	52.1%
Young Singles	24.2	$40,048	0.5	0.0%	65.1%

Psychographics

Lifestage Segment	% Fitness	% Outdoors	% Travel	% Domestic	% Cultural	Bluechip	DIY	% Technology
Dinks	30.0%	29.9%	30.0%	10.0%	10.0%	40.0%	5.0%	29.9%
Empty Nesters	5.0%	20.0%	5.0%	25.0%	25.0%	10.0%	30.0%	4.9%
Families with Teens	10.0%	25.0%	10.0%	20.0%	20.0%	20.0%	20.0%	9.9%
Retired	5.0%	10.0%	5.0%	30.0%	30.1%	15.0%	15.0%	4.9%
Young Families	20.0%	29.9%	20.0%	15.0%	15.0%	30.0%	10.0%	19.9%

882 876 878 880 884 886

FIG. 11

Marketing Executive

Home | Activities | Campaigns

Welcome, Administrator! Alerts - My Account - Admin - Reports - Delivery - Help - Log Off

New Column New Page Properties

Customer Analysis

Segment Overview (980) [Edit]

Customers by Segment

- Dinks — 24.2%
- Empty Nesters — 29.0%
- Families with Teens — 10.9%
- Retired — 15.4%
- Young Families — 7.9%
- Young Singles

Lifestage Segment Consumer Count

Segment	Count
Dinks	187,483
Empty Nesters	83,978
Families with Teens	119,636
Retired	60,314
Young Families	225,236
Young Singles	99,620
Grand Total	**776,269**

New Section | Add Folder | Edit Column (988)

Key Metrics (982) [Edit]

Lifestage Segment	Total Product Count	Products per Customer	Total Assets	Total Profitability
Dinks	1,702,810	2.27	$8,514,096,366	$371,519,000
Empty Nesters	2,689,965	2.56	$55,220,791,311	$309,359,290
Families with Teens	2,403,706	2.40	$26,206,477,568	$348,602,730
Retired	2,797,919	2.00	$80,686,516,090	$245,735,795
Young Families	1,633,923	2.18	$8,442,030,751	$457,661,740
Young Singles	811,436	1.62	$954,138,771	$74,439,790

Demographics (984) [Edit]

Lifestage Segment	Average Age	Average Income	Average Family Size	% Married	% Male
Dinks	30.5	$60,012	1.5	40.0%	55.1%
Empty Nesters	55.5	$70,021	1.5	80.1%	45.0%
Families with Teens	46.5	$65,023	3.5	90.0%	51.1%
Retired	79.5	$45,028	1.5	80.1%	45.1%
Young Families	38.5	$50,013	2.5	70.1%	52.1%
Young Singles	24.2	$40,048	0.5	0.0%	65.1%

Psychographics (986) [Edit]

Lifestage Segment	% Fitness	% Outdoors	% Travel	% Domestic	% Cultural	% Bluechip	% DIY	% Technology
Dinks	30.0%	29.9%	30.0%	10.0%	10.0%	40.0%	5.0%	29.9%
Empty Nesters	5.0%	20.0%	5.0%	25.0%	25.0%	10.0%	30.0%	4.9%
Families with Teens	10.0%	25.0%	10.0%	20.0%	20.0%	20.0%	20.0%	9.9%
Retired	5.0%	10.0%	5.0%	30.0%	30.1%	15.0%	15.0%	4.9%
Young Families	20.0%	29.9%	20.0%	15.0%	15.0%	30.0%	10.0%	19.9%
Young Singles	40.0%	20.0%	40.0%	10.1%	10.0%	30.1%	5.0%	29.8%

930

FIG. 12

FIG. 13A

ANATOMY OF A MARKETING CAMPAIGN: THEN AND NOW
26 WEEKS VS. 26 MINUTES

26 Weeks: For many companies today, moving from marketing idea to campaign execution is a long, laborious series of steps. Collaboration is hindered by functional silos. Data are gathered in batch from external departments and outside agencies. By the time the campaign is out the door, the data have aged, leaving opportunity to more quickly moving competitors.

Marketing maverick comes up with idea

Marketing maverick tests idea with a few people

Marketing maverick asks IS to do an extract based on concept

First extract comes back

Marketing maverick checks out the data

Marketing maverick asks analytics to do some predictive modeling

26 Minutes: Gathered in a quality circle, the cross-functional marketing team views analysis of real-time data, brainstorms ideas, and assigns responsibilities. With integrated tools and data at their fingertips, they are able to move quickly, employing technology to integrate customer data, content, and fulfillment to deliver the marketing campaign—getting it right the first time.

Marketing manager calls cross-functional team together to present ideas. Team huddles.

Team disperses to fulfill tasks.

FIG. 13B

IS comes back with another extract

Analytic types come back with a segmentation

Outside agency comes in with a view of data/ segmentation

Agency comes back with creative packaging

Campaign is sent off to fulfillment house

Campaign is launched

WED

FRI

MON

WED

FRI

14 16 17 18 19 20 21 22 23 24 25 26

"Run another model."

"Check for fit with existing campaigns."

"Pull up previous campaigns."

"Check with call center to determine scheduling."

Campaign is launched, while team gears up for next campaign